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The rationale being employed for repealing net neutrality – that it supposedly discourages investment in broadband – misses the larger point. The FCC's mission is to ensure that Americans are well served by communications, not to bolster the business model of communications providers themselves. Therefore, even if one supposes that more money would be invested in broadband deployment in the absence of net neutrality, this must be balanced against the reduced utility provided by such a network.

In this hypothetical scenario of increased investment, it must follow that there is greater revenue obtained per customer served than there would be with net neutrality in place; otherwise there would be no reason for a rational actor to make those increased investments. To suppose that repealing net neutrality would spur increased investment, with returns on that marginal investment derived solely from increasing the size of the customer base, would be magical thinking: if those investments made sense without the changes in business practices enabled by repeal, they would happen in the absence of repeal. The business plan must involve increased revenue per customer.

Increased revenue per customer would not be obtained, in this scenario, from providing faster or more reliable service, wider geographic coverage, or new over-the-top services; these options are open to communications providers under existing regulations. It would have to come from additional fees paid by customers for online activities they currently engage in for no marginal cost. Unfortunately, the fee structure that would make the most business sense for communications providers is one that tends to exclude competitors or new entrants to the market, making use of the lack of competition in wireline Internet service to push revenue streams (e.g. for video streaming services) toward the communications providers or their affiliated companies.

For example, in my location (in a major metropolitan area, at that), there is only one provider, Charter, offering wireline or wireless Internet service at sufficient speed for reliable 1080p video streaming. If they were to decide to throttle traffic from Amazon Video to the point of un-usability, I would have to subscribe to their cable TV service and pay more for what I find to be inferior content, or simply do without. Although this might allow Charter to make greater profits (some of which might be used to make network investments), neither case would be better for me than status quo. Worse yet, Charter could decide to charge extra fees for reliable packet delivery to and from services, such as YouTube and Instagram, that are essential to my business, and I would have no recourse but to pay up. Attempting to resolve the matter through the FTC or persuading the government to bring an antitrust suit would be far too slow and fraught with uncertainty compared to the FCC taking enforcement action on an existing rule.

In the last thirty years, the Internet has grown from a technical curiosity to the primary means of communication for the entire world. Access to it is even more necessary to modern life than is access to the public switched telephone network. It is essential for the FCC to protect it so it can continue to serve all Americans.